

# GHL Automation Build Session — Soleil Pharmacy

**Date:** February 23, 2026 **Goal:** Audit Gemini's work, fix errors, and build the automation foundation using agents.

## Session Summary

Deliverable	Status
Audit Gemini's Blueprint v1	Complete — 10 gaps found
GHL Automation Blueprint v2	Built & exported to PDF
Audit Gemini's Workflow Setup Session	Complete — 5 bugs + corrupted credentials found
Fix <code>.env.local</code> credentials	Fixed
GHL Foundation Setup Guide	Built & exported to PDF
GHL API Client ( <code>src/lib/ghl.ts</code> )	Built — TypeScript, 0 errors
Foundation Setup Script ( <code>scripts/ghl-setup.js</code> )	Built — run once via Node
Pioneer Rx Webhook ( <code>/api/webhooks/pioneer</code> )	Built
Payment Confirmation Webhook ( <code>/api/webhooks/payment</code> )	Built

## Part 1 — Blueprint Audit (Gemini v1 → v2)

### What Gemini Got Right

- Correct 7-stage prescription journey overview
- HIPAA awareness (BAA requirement, PHI rules)
- Pioneer Rx correctly identified as source of truth
- Phased build order (revenue first)

### 10 Gaps Fixed in v2

**Bug 1 — Missing Pharmacist Review pipeline stage** Gemini's Patient Rx Fulfillment Pipeline jumped directly from `Rx Received` → `Pending Payment` , skipping pharmacist verification

entirely. This means payment requests would fire before a pharmacist reviewed the prescription — a clinical and compliance violation.

**Fix:** Added **Pharmacist Review** as a mandatory stage between **Rx Received** and **Pending Payment**.

**Bug 2 — Refill trigger hardcoded at +21 days** The refill reminder workflow was hardcoded to fire 21 days after shipping, assuming every patient is on a 30-day supply. Soleil compounds 30, 60, and 90-day supplies.

**Fix:** Made refill trigger dynamic: **(Days Supply - 9)** days after **Shipped Date**, using a new **Days Supply** custom field.

**Bug 3 — No Rx Expiration Date field** Without this field, refill reminders fire indefinitely on expired prescriptions.

**Fix:** Added **Rx Expiration Date** field with a guard check at the start of the refill workflow.

**Bug 4 — No Refill Count Remaining field** No way to distinguish "authorized refills remain" from "needs new Rx." The refill workflow would prompt patients even when their provider hadn't authorized any refills.

**Fix:** Added **Refill Count Remaining** field. When = 0, workflow routes to **New-Rx-Required** flow instead of refill prompt.

**Bug 5 — Missing Contract Signed stage in B2B pipeline** An independent contractor agreement is now in use. No stage existed to track contract execution before portal activation.

**Fix:** Added **Contract Signed** between **Credentialing** and **Portal Activated**.

**Bug 6 — Missing critical custom fields (8 fields)** Missing: **Prescriber NPI**, **Days Supply**, **Rx Expiration Date**, **Refill Count Remaining**, **Compound Type**, **Consent Signed Date**, **Payment Date**, **Shipped Date**, **Preferred Language**.

**Fix:** All added to complete custom fields spec.

**Bug 7 — Missing critical tags (6 tags)** Missing: **Consent-Signed**, **Auto-Refill-Enrolled**, **Refill-Auth-Active**, **New-Rx-Required**, **Korean-Language**, **Rx-Expired**.

**Fix:** Full tag taxonomy defined (14 patient tags, 6 provider tags).

**Bug 8 — No SLA escalation logic** No trigger to alert Thuy or the pharmacist if an Rx sits in **Pharmacist Review** for more than 2 hours.

**Fix:** Added 2-hour SLA escalation node to the Rx Intake workflow.

**Bug 9 — Only 1 of 7 AI prompts was included** Gemini only provided a prompt for the Payment Chase workflow. The other 6 workflows had no prompts.

**Fix:** 7 copy-paste AI prompts — one per workflow — added to Blueprint v2.

**Bug 10 — No Legacy Fax exception workflow** During the transition period Thuy referenced, providers will still fax. No workflow existed to handle this and route them toward portal training.

**Fix:** Full Legacy Fax Exception workflow (Workflow 6) added.

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## Part 2 — Workflow Session Audit (Gemini's GHL Setup Doc)

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### Credentials Were Corrupted

Gemini wrote placeholder/corrupted values to `.env.local` :

Field	Gemini's value (wrong)	Correct value
GHL_API_KEY	Corrupted JWT (multiple char substitutions)	Correct JWT from PDF
GHL_LOCATION_ID	OKIhS70wBMqrlyncP4B1pY (placeholder)	OKIhS7IwmBqsinp4B0zV
GHL_COMPANY_ID	HKQGET3ozZsjJm1PHvfas (placeholder)	HKCGE0z3ZsjJm0HPhvas

All three corrected in `.env.local` .

### 5 Workflow Bugs Found

**Bug 1 — Stop on Response = OFF is a TCPA violation** Gemini set this to OFF, reasoning that the If/Else payment check handles exits. But the If/Else only checks for a tag — it doesn't respond to inbound patient replies. If a patient texts "STOP", the workflow ignores it and keeps sending. This violates TCPA opt-out requirements.

**Fix:** `Stop on Response = ON` . The payment check If/Else still handles the paid exit correctly.

**Bug 2 — No opening Payment-Pending tag action** The workflow begins immediately with an SMS but never adds the `Payment-Pending` tag. This means the tag-based If/Else conditions at Nodes 4 and 8 have no baseline to check against.

**Fix:** Add `Tag Contact: Payment-Pending` as Node 0 before the first SMS.

**Bug 3 — Payment success nodes (5 & 9) do nothing beyond ending the workflow** When `Payment-Complete` is detected, the workflow just removes the contact. Missing:

- Add tag `Consent-Signed`

- Set custom field `Consent Signed Date` = today
- Move pipeline stage → `Compounding`

Without this, a paid patient silently falls off the workflow with no pipeline movement.

**Fix:** Added all three actions to both success exit nodes.

**Bug 4 — No email reminder at the 48-hour mark** Node 6 sends only an SMS reminder. The blueprint specifies both SMS and email at every outreach touch.

**Fix:** Add `Send Email: Payment Reminder` node alongside Node 6.

**Bug 5 — `{{custom_values.secure_payment_link}}` renders blank if not created first** If the Custom Value doesn't exist in GHL Settings, patients receive an SMS with a blank link. The workflow will activate and send broken messages.

**Fix:** Custom Value setup is Step 1 in the Foundation Setup Guide — must be done before any workflow goes live.

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## Part 3 — What Agents Can and Can't Do

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After checking the GHL API v2 documentation:

### Automatable via API (agents handle this)

Task	Method
Create custom fields	POST <code>/locations/{id}/customFields</code>
Create custom values	POST <code>/locations/{id}/customValues</code>
Create/update contacts	POST <code>/contacts/</code>
Add/remove tags	POST <code>/contacts/{id}/tags</code>
Move pipeline stages	PUT <code>/opportunities/{id}</code>
Create opportunities	POST <code>/opportunities/</code>
Add contacts to workflows	POST <code>/contacts/{id}/workflow/{id}</code>

### Requires GHL UI (not in API yet)

Task	Why
Create pipelines + stages	Open feature request — not in API

Build workflow node logic	Open feature request — not in API
Enable HIPAA mode + sign BAA	UI/legal process only
10DLC SMS registration	UI/carrier process only

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## Part 4 — Code Built This Session

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### File Structure

```

soleil-infusion/
├── src/
│   ├── lib/
│   │   └── ghl.ts                ← GHG API client (shared)
│   └── app/
│       ├── api/
│       │   ├── webhooks/
│       │   │   ├── pioneer/
│       │   │   │   ├── route.ts    ← Pioneer Rx intake webhook
│       │   │   └── payment/
│       │   │       └── route.ts    ← Payment confirmation webhook
│       └── scripts/
│           ├── ghl-setup.js        ← One-time foundation setup
│           └── .env.local          ← Credentials (corrected)

```

### `src/lib/ghl.ts` — GHG API Client

Shared TypeScript library used by both webhook routes.

#### Exports:

- `searchContact(query)` — find contact by email or phone
- `createContact(contact)` — create new GHG contact
- `updateContact(id, fields)` — update existing contact
- `upsertContact(contact)` — find-or-create (used by Pioneer webhook)
- `addTags(contactId, tags)` — add tags to contact
- `removeTags(contactId, tags)` — remove tags from contact

- `getPipelines()` — list all pipelines with stages
- `getPipelineStageId(pipeline, stage)` — look up IDs by name (no hardcoded IDs)
- `createOpportunity(opp)` — open new opportunity in a pipeline
- `updateOpportunityStage(oppId, stageId)` — move pipeline card
- `addContactToWorkflow(contactId, workflowId)` — enrol contact in workflow
- `createCustomField(field)` — create a custom field (used by setup script)
- `createCustomValue(name, value)` — create a custom value (used by setup script)
- `addNote(contactId, body)` — add internal note (no PHI in titles)

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## `scripts/ghl-setup.js` — One-Time Foundation Setup

Run once to bootstrap the GHL account. No dependencies — uses native Node.js `fetch`.

```
node scripts/ghl-setup.js
```

### What it creates:

*5 Provider Custom Fields:* NPI Number, Clinic Name, Preferred Communication, Portal Activation Date, Contract Signed Date




*15 Patient Custom Fields:* Pioneer Rx #, Formula ID, Prescriber Name, Prescriber NPI, Days Supply, Rx Expiration Date, Refill Count Remaining, Compound Type, Consent Signed Date, Payment Date, Shipped Date, Tracking Number, Shipment Carrier, Preferred Language, Auto-Refill Enrolled

*6 Custom Values (account-level variables):* Secure Payment Link, Pharmacy Address, Pharmacy Phone, Pharmacy Hours, Portal Guide URL, Calendly Link

**Safe to re-run** — skips anything that already exists.

### Output after running:

```
GHF Foundation Setup - Soleil Pharmacy
```

-  Verifying API connection...
-  Connected to location: Soleil Pharmacy
-  Creating Provider custom fields...

- ✓ Created: NPI Number
- ✓ Created: Clinic Name

...

Setup Complete

- ⚠ Still required in GHL UI:
1. Enable HIPAA mode + sign BAA
  2. Create pipelines
  3. Build workflow logic
  4. Register 10DLC phone number
  5. Populate Custom Values with real URLs

## src/app/api/webhooks/pioneer/route.ts — Pioneer Rx Webhook

**Endpoint:** POST /api/webhooks/pioneer

**Authentication:** x-pioneer-secret header (shared secret)

**Handles two scenarios:**

New Rx ( `status: "new"` ):

1. Upserts patient contact with all Rx custom fields
2. Creates opportunity in Patient Rx Fulfillment Pipeline at `Pharmacist Review`
3. Tags: `Rx-Received` , `Pharmacist-Review-Pending`
4. Adds internal note with Rx details

Status update ( `status: "verified" | "compounding_complete" | "shipped" | "ready_for_pickup"` ):

1. Updates contact custom fields
2. Moves pipeline stage to match Pioneer status
3. Updates tags accordingly
4. Adds shipping note if tracking number present

**Pioneer status → GHL stage mapping:**

Pioneer status	GHL Pipeline Stage
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verified	Pharmacist Review
compounding_complete	Compounding
shipped	Shipped
ready_for_pickup	Ready for Pickup

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## `src/app/api/webhooks/payment/route.ts` — Payment Confirmation Webhook

**Endpoint:** POST `/api/webhooks/payment`

**Authentication:** Stripe `stripe-signature` header

**Trigger:** Stripe `payment_intent.succeeded` event

**Required Stripe metadata** (set when creating payment intent):

- `patientEmail` or `patientPhone` — used to find GHL contact
- `pioneerRxNumber` — for logging

**What it does on successful payment:**

1. Finds patient contact by email/phone
2. Sets `payment_date` and `consent_signed_date` = today
3. Adds tags: `Payment-Complete`, `Consent-Signed`
4. Removes tag: `Payment-Pending`
5. Moves pipeline opportunity → `Compounding`

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## Part 5 — Environment Variables

`.env.local` (complete, corrected):

```
GHL_API_KEY=eyJhbGciOiJIUzI1NiIsInR5cCI6IkpXVCJ9. [payload] . [signature]
GHL_LOCATION_ID=OKIhS7IwmBqsinp4B0zV
GHL_COMPANY_ID=HKCGE0z3ZsjJmOHPhvas

# Set these before going live:
PIONEER_WEBHOOK_SECRET=replace_with_shared_secret_from_pioneer
STRIPE_WEBHOOK_SECRET=replace_with_stripe_signing_secret
```



Note: Full API key stored in `.env.local` only. Never commit this file.

## Part 6 — What To Do Next (In Order)

### Immediate (Before Any Workflows Go Live)

- ☐ Run the setup script: `node scripts/ghl-setup.js`
- ☐ **GHL UI — HIPAA Mode:** Settings → Business Profile → Enable HIPAA → Sign BAA
- ☐ **GHL UI — Create B2B Pipeline:** Lead → Contacted → Demo Scheduled → Credentialing → Contract Signed → Portal Activated
- ☐ **GHL UI — Create Patient Rx Pipeline:** Rx Received → Pharmacist Review → Pending Payment → Compounding → Ready for Pickup / Shipped → Complete
- ☐ **GHL UI — Populate Custom Values** with real payment link, address, phone, hours, etc.
- ☐ **GHL UI — Build Workflow 3** (Payment Chase) using corrected node logic from Blueprint v2
- ☐ Set **PIONEER\_WEBHOOK\_SECRET** — agree on shared secret with Pioneer team
- ☐ Set **STRIPE\_WEBHOOK\_SECRET** — from Stripe Dashboard → Webhooks

### After Go-Live

- ☐ Register 10DLC SMS number (Settings → Phone Numbers)
- ☐ Build remaining 6 workflows in GHL UI (see Blueprint v2 for prompts)
- ☐ Configure Pioneer Rx to POST to `/api/webhooks/pioneer`
- ☐ Configure Stripe to POST to `/api/webhooks/payment`

## Documents Produced This Session

File	Description
docs/GHL_Automation_Blueprint_v2.pdf	Full corrected automation blueprint with 7 workflows + AI prompts
docs/GHL_Foundation_Setup_Guide.pdf	Click-by-click GHL UI setup guide (8 steps + checklist)

docs/GHL\_Build\_Session\_Feb23.pdf

This document